

ORIGINAL

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July 28, 1999

EX PARTE OR LATE FILED

Lynn Shapiro Starr
Vice President
Regulatory Affairs

RECEIVED

JUL 28 1999

FEDERAL COMMUNICATIONS COMMISSION
OFFICE OF THE SECRETARY

Mr. Mark Nadel
Accounting Policy Division
Federal Communications Commission
445 12th Street, SW
Room 5B551
Washington, DC

Re: CC Docket 98-141

Dear Mark:

Enclosed please find the additional information you requested concerning the SBC/Ameritech Lifeline Proposal in connection with the above referenced proceeding.

Specifically, I have included:

1. A document which clarifies Ameritech's July 23, 1999 filing by explaining in greater detail: (a) the terms of the state and federal support which will be offered to Illinois Lifeline customers beginning in October, 1999, with specific reference to those customers in Access Area A; and (b) the meaning of a paragraph describing the history of the Ohio USA Program and the terms of the Advantage Ohio agreement.
2. A spreadsheet indicating the monthly cost to Lifeline customers in Ohio, Illinois, Indiana, Michigan and Wisconsin after the Access Line + EUCL are deducted from the total Lifeline support they will be receiving from the federal Universal Service Fund, any state funds, and Ameritech.
3. A spreadsheet which revises Ameritech's July 23, 1999 filing by utilizing the correct formula to calculate the growth rate in Lifeline customers in the Ameritech region between January 1, 1998 and July 1, 1999.
4. March 1999 and June 1999 Status Reports Submitted to the Public Utilities Commission of Ohio Pursuant to Case No. 93-487-TP-ALT

Lifeline eligibility is income-based only in the remaining states of the Ameritech region (Michigan, Illinois, Indiana and Wisconsin) and none of the existing Lifeline programs include a vertical services restriction.

Sincerely,

A handwritten signature in cursive script that reads "Lynn Starr".

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List ABCDE

Response to FCC Data Request 2

A. In its filing describing the support Illinois Lifeline customers in Access Area A will begin receiving in October, 1999, Ameritech provided the following information:

Illinois

Current

\$5.25 (federal contribution)
\$1.50 (state contribution: **begins 10/99**)
\$0.75 (federal match of state contribution: **begins 10/99**)
7.50

Proposed Alternative

Area A (Access Line + EUCL: **\$6.05**)

\$5.25 (federal contribution)
\$1.50 (state contribution: **begins 10/99**)
\$0.75 (federal match of state contribution: **begins 10/99**)
\$0.00 (Ameritech contribution)
\$0.00 (federal match of Ameritech contribution)
7.50

As detailed above, in October, 1999, Illinois Lifeline customers in Access Area A will begin receiving \$1.50 in state Lifeline support and \$6.00 in federal Lifeline support even though the price of an Access Line + EUCL in Access Area A is only \$6.05.¹

Pursuant to the Illinois Commerce Commission Order authorizing the \$1.50 state subsidy, there are no restrictions on what customers in Access Area A may do with the \$1.45 balance remaining after the cost of the Access Line and EUCL are deducted from the \$7.50 they will receive: it is not unreasonable to expect that in most instances it will probably be spent on local usage.

Lifeline customers in Illinois Access Area A may receive state and federal Lifeline support which, in total, exceeds the price of an Access Line and EUCL because the federal support they receive will be limited to \$6.00. This level of federal support is consistent with both 47 C.F.R. s. 54.403 which provides that "federal Lifeline support

¹ Pursuant to Order issued by the Illinois Commerce Commission on April 21, 1999. (See Order, The Universal Service Telephone Assistance Corporation Petition for determination of the amount and form of supplemental assistance to be provided by local exchange carriers, pursuant to 83 Ill. Adm. Code s. 757.200(b), I.C.C. Docket 98-0884, dated April 21, 1999)

shall not exceed \$7.00 per qualifying low-income customer” and 47 C.F.R. s. 54.407, which provides that an “eligible telecommunications carrier’s universal service support reimbursement shall not exceed the carrier’s standard, non-Lifeline rate”.²

B. In its filing describing the history of the USA Plan in Ohio, Ameritech stated that:

“It should be noted that the USA Advantage Ohio commitment of an \$8.00 monthly discount included a maximum Ameritech component of \$4.50. So if, for example, total Federal support amounted to \$5.25, USA customers would receive a \$9.75 monthly discount (\$4.50 plus \$5.25) rather than \$10.20. In theory, given Federal support up to \$7.00, the USA discount could be as much as \$11.50, but the discount was limited to \$10.20 because that amount covers the total access line rate.”

The above referenced paragraph makes the following points:

- (1) Under the terms of the rules governing the federal Universal Service Fund, which provide that federal support per line may not exceed \$7.00, and the terms of the Advantage Ohio agreement, which provide that Ameritech is obligated to contribute no more than \$4.50 per line, Lifeline customers theoretically could have received \$11.50 in total support:

\$5.25 (federal contribution)
\$4.50 (Ameritech’s maximum per line contribution under Advantage Ohio)
\$1.75 (federal match of Ameritech contribution: this is less than 50% because of
the \$7.00 cap on federal support per line)
11.50 (TOTAL)

However, because the Access Line Rate + EUCL in Ohio is only \$10.20, Ameritech provides \$3.30 per line. When the 50% federal match is added to Ameritech’s contribution the entire Access Line Rate + EUCL is covered:

\$5.25 (federal contribution)
\$3.30 (Ameritech contribution provided pursuant to Advantage Ohio)
\$1.65 (federal match of Ameritech contribution)
10.20 (TOTAL)

² While “standard non Lifeline rate” does not appear to be defined in the rules, the \$6.00 in federal support which Illinois Lifeline customers in Access Area A will receive is less than the \$6.05 cost of the Access Line + EUCL.

- (2) As detailed above, under the terms of the Advantage Ohio agreement, the maximum amount Ameritech is obligated to contribute per line is \$4.50. This per line maximum did not change when the current federal Lifeline program began in January, 1998 and remains in place today.
- (3) The \$4.50 per line maximum negotiated pursuant to Advantage Ohio would not increase, even if there were no 50% federal match i.e. if federal support were limited to \$5.25. In the event that federal support was so limited, customers would receive the following support:

\$5.25 (federal contribution)

\$4.50 (Ameritech's maximum per line contribution under Advantage Ohio)

9.75 (TOTAL)

Monthly Cost to Consumers

ILLINOIS

Area A

Access Line + EUCL	\$	6.05
Total Proposed Support	\$	7.50
Monthly Cost to Consumer	\$	(1.45)

Area B

Access Line + EUCL	\$	9.03
Total Proposed Support	\$	9.03
Monthly Cost to Consumer	\$	-

Area C

Access Line + EUCL	\$	12.50
Total Proposed Support	\$	10.20
Monthly Cost to Consumer	\$	2.30

INDIANA

Flat Rate

Exchange Rate Classification 1

Access Line + EUCL	\$	13.35
Total Proposed Support	\$	10.20
Monthly Cost to Consumer	\$	3.15

Exchange Rate Classification 2

Access Line + EUCL	\$	14.61
Total Proposed Support	\$	10.20
Monthly Cost to Consumer	\$	4.41

Exchange Rate Classification L

Access Line + EUCL	\$	15.67
Total Proposed Support	\$	10.20
Monthly Cost to Consumer	\$	5.47

Exchange Rate Classification 3

Access Line + EUCL	\$	16.67
Total Proposed Support	\$	10.20
Monthly Cost to Consumer	\$	6.47

INDIANA

Message Rate

Access Line + EUCL	\$	9.98
Total Proposed Support	\$	9.66
Monthly Cost to Consumer	\$	0.32

WISCONSIN

Access Areas A, B, C

Access Line + EUCL	\$	9.99
Total Proposed Support	\$	9.25
Monthly Cost to Consumer	\$	0.74

1. Approximately 15% of the Flat Access Line Rate in Indiana goes to usage.

2. Approximately 5% of the Message Line Rate in Indiana goes to usage.

Monthly Cost to Consumers

MICHIGAN

Call Plan 50

Area A

Access Line + EUCL	\$	13.83
Total Proposed Support	\$	10.20
Monthly Cost to Consumer	\$	3.63

B

Access Line + EUCL	\$	14.25
Total Proposed Support	\$	10.20
Monthly Cost to Consumer	\$	4.05

B2

Access Line + EUCL	\$	14.25
Total Proposed Support	\$	10.20
Monthly Cost to Consumer	\$	4.05

C1

Access Line + EUCL	\$	14.11
Total Proposed Support	\$	10.20
Monthly Cost to Consumer	\$	3.91

C2

Access Line + EUCL	\$	14.11
Total Proposed Support	\$	10.20
Monthly Cost to Consumer	\$	3.91

C3

Access Line + EUCL	\$	14.11
Total Proposed Support	\$	10.20
Monthly Cost to Consumer	\$	3.91

C4

Access Line + EUCL	\$	14.11
Total Proposed Support	\$	10.20
Monthly Cost to Consumer	\$	3.91

C5

Access Line + EUCL	\$	14.11
Total Proposed Support	\$	10.20
Monthly Cost to Consumer	\$	3.91

MICHIGAN cont.**Call Plan 400**

Area A

Access Line + EUCL	\$	17.19
Total Proposed Support	\$	10.20
Monthly Cost to Consumer	\$	6.99

B

Access Line + EUCL	\$	17.19
Total Proposed Support	\$	10.20
Monthly Cost to Consumer	\$	6.99

B2

Access Line + EUCL	\$	16.72
Total Proposed Support	\$	10.20
Monthly Cost to Consumer	\$	6.52

C1

Access Line + EUCL	\$	15.28
Total Proposed Support	\$	10.20
Monthly Cost to Consumer	\$	5.08

C2

Access Line + EUCL	\$	15.52
Total Proposed Support	\$	10.20
Monthly Cost to Consumer	\$	5.32

C3

Access Line + EUCL	\$	16.03
Total Proposed Support	\$	10.20
Monthly Cost to Consumer	\$	5.83

C4

Access Line + EUCL	\$	16.55
Total Proposed Support	\$	10.20
Monthly Cost to Consumer	\$	6.35

C5

Access Line + EUCL	\$	17.06
Total Proposed Support	\$	10.20
Monthly Cost to Consumer	\$	6.86

Call Plan 400 Extended

All Areas

Access Line + EUCL	\$	34.43
Total Proposed Support	\$	10.20
Monthly Cost to Consumer	\$	24.23

Call Plan Unlimited

All Areas

Access Line + EUCL	\$	46.58
Total Proposed Support	\$	10.20
Monthly Cost to Consumer	\$	36.38

Monthly Cost to Consumers

OHIO

USA 1

Area B

Access Line + EUCL	\$	10.20
Total Proposed Support	\$	10.20
Monthly Cost to Consumer		\$0.00

Area C

Access Line + EUCL	\$	10.20
Total Proposed Support	\$	10.20
Monthly Cost to Consumer		\$0.00

Area D

Access Line + EUCL	\$	10.20
Total Proposed Support	\$	10.20
Monthly Cost to Consumer		\$0.00

USA 2

Area B

Access Line + EUCL	\$	10.20
Total Proposed Support	\$	5.25
Monthly Cost to Consumer	\$	4.95

Area C

Access Line + EUCL	\$	10.20
Total Proposed Support	\$	5.25
Monthly Cost to Consumer	\$	4.95

Area D

Access Line + EUCL	\$	10.20
Total Proposed Support	\$	5.25
Monthly Cost to Consumer	\$	4.95

AIT/SBC MERGER LIFELINE COMMITMENT ANALYSIS

Current Lifeline Customers without vertical features

State	Line Count 6/99	% of Lines w/o Vertical Features - Est.	No. of Lines w/o Vertical Features - Est.
IL	38,959	42%	16,480
IN	16,387	48%	7,784
MI	118,419	45%	52,696
OH	70,085	62%	43,685
WI	44,810	44%	19,672
Total	288,660	48.6%	140,317

Lifeline Customer Growth Rates

State	Line Count 1/98	Line Count 6/99	Line Growth: 1/98-6/99	Growth Rate: 1/98-6/99
IL	1,818	38,959	37,141	2043%
IN	3,806	16,387	12,581	331%
MI	111,704	118,419	6,715	6%
OH	47,567	70,085	22,518	47%
WI	10,153	44,810	34,657	341%
Total	175,048	288,660	113,612	



March 15, 1999

Ms. Daisy Crockron
Docketing Division
The Public Utilities Commission of Ohio
180 East Broad Street
Columbus, Ohio 43215

Re: Case No. 93-487-TP-ALT

Dear Ms. Crockron:

As required by the Commission's Opinion and Order issued December 30, 1998, attached for filing is a report of Ameritech's activities toward complying with the decision. A copy of the report was provided to the USA Advisory Committee.

Sincerely,

Judith E. Matz
for Lori Watiker
Director, Regulatory Affairs



Case No. 93-487-TP-ALT
Ameritech USA Status Report
March 15, 1999

Requirement 1: Ameritech shall designate one person to have responsibility for the USA program. That person should have ample decision-making authority for the various issues related to this program, be capable of overseeing the program (including changes), and be committed to carrying out the responsibilities of the program...

Status: In order to comply with this requirement, Ameritech has designated Susan Murtha.

Requirement 2: Improvements should be made with regard to publicity... Personnel capable of developing appropriate materials must be available for this program and an "action plan" under which future publicity efforts will be undertaken should be developed. The action plan should be provided to the Advisory Committee so that it may consider Ameritech's intentions for its publicity efforts.

Status: Susan Murtha has been working with the marketing and communication group to develop a communication plan. A draft copy was shared with the Advisory Committee on February 22, 1999. A communications sub-committee meeting was held on March 4, 1999 for all Advisory Committee members to provide further input into the plan. The communications plan was unanimously approved by the Advisory Committee. Attached is a copy of the communications plan.

In addition, a USA bill page message started with the February 16, 1999 billing cycle. A mass mailing was completed with the Ohio Department of Development (HEAP) in January and February. A mass mailing will also be completed in March. A USA flyer was created and 25,000 copies were printed and distributed to the Advisory Committee members. A Spanish flyer is currently being developed. A press release is scheduled to be issued this month.

Requirement 3 (Entry on Rehearing dated February 17, 1999): It was concluded that modifying the composition of the dedicated workgroup will not be required...Ameritech shall devise a comprehensive action plan within 30 days of the Entry on Rehearing pursuant to which it will make appropriate changes to ensure proper handling by the various personnel involved with USA calls... This action plan shall be filed with the Commission and provided to the Advisory Committee (so that Ameritech and the Advisory Committee can consider the plan and work together to fine tune it). Once finalized, Ameritech shall implement the action plan forthwith.

Status: On February 18, 1999, Ameritech held a joint observation session with the Commission staff to observe the USA application process and call handling. Comments and suggestions provided by Staff were incorporated into the process. Susan Murtha and the USA vendor manager spent time working with the vendor service representatives and

provided them with a detailed script and rationale. Numerous observing sessions were held to ensure process compliance. A second observing session was held with Staff on March 1, 1999.

A comprehensive action plan is currently being developed and will be filed with the Commission and shared with the Advisory Committee.

Requirement 4: Ameritech shall negotiate the necessary terms and obligations to implement with various service agencies an on-line verification process. Additionally, Ameritech should negotiate the necessary terms and obligations to implement an automatic enrollment pilot with various service agencies (for a discrete area in Ohio). Commission staff should be involved in those discussions as well.

Status: Ameritech has defined the scope of this requirement and a team has been formed to implement it. Included in this team is the Commission staff and the ODHS programmer. Susan Murtha contacted Cincinnati Bell to discuss steps they have taken to implement automatic enrollment.

Requirement 5: Written applications (particularly with an automatic enrollment pilot) should be accepted by Ameritech... Ameritech shall work with the Advisory Committee to develop an appropriate written application form.

Status: A draft copy of the written application form was shared with the Advisory Committee during the communications sub-committee on March 4, 1999. The Advisory Committee made suggestions and unanimously approved the application form. The suggestions were incorporated and the application form is attached. Both an English and Spanish version is planned. Note that the form is tri-fold and contains a perforated, self-addressed, and postage paid application.

Requirement 6: Ameritech is instructed to recognize the need to adjust staffing and fulfill that staffing need with scheduled USA publicity efforts.

Status: Ameritech will continue to monitor and evaluate staffing levels. Additionally, there were no staffing issues encountered in 1998.

Requirement 7: Ameritech should conduct a formal study to evaluate the reasons for USA "drop offs." The Advisory Committee and Commission staff should review this study prior to being conducted.

Status: Lori Watiker has met with the Commission staff on two occasions to begin preliminary planning for the study. A third meeting, scheduled for Monday, March 8, 1999, was canceled by Staff and will be rescheduled. As requested by Staff, data is being gathered to help determine next steps. New reports have been requested and will be shared with Staff to determine the study methodology. Susan Murtha is working to coordinate a team that will be able to assist with the study.

Requirement 8: Ameritech should fulfill its commitment to install direct line telephones in all ODHS offices in its service territory for which a technical feasibility issue is not present.

Status: Directors of the ODHS offices have been identified. Susan Murtha is currently in the process of developing a letter to be sent to the directors asking their permission to install a telephone at their particular location. The letter will be mailed this week.

Requirement 9 (Entry on Rehearing issued February 17, 1999): Ameritech is instructed to appropriately modify the VRU information and make the information available under another submenu, besides "new services."

Status: The list of eligibility programs has been updated and re-recorded and will be in production with the March release. The new VRU verbiage was shared with and approved by Staff.

The revised verbiage regarding the seasonal aspect of HEAP and OECP has been approved by the Commission staff and is being recorded for the April release.

It has been determined that the secondary placement of USA on the VRU will be on all calls directed to the customer care center representatives.



**OHIO UNIVERSAL SERVICE
ASSISTANCE (USA)
PROGRAM**

1999 MARKETING PLAN

March 10, 1999

PLAN DESCRIPTIONS

Ohio's Universal Service Assistance (USA) plans enable qualified low-income customers to better afford phone service by reducing the cost of basic telephone service for Ameritech customers in Ohio. New and existing qualified customers can choose between two different USA plans, both of which are described below:

□ **USA Plan 1**

- **Eligibility:**
Potential enrollee must receive aid from one of the following programs: Disability Assistance, Federal Public Housing, Food Stamps, Home Energy Assistance Programs (HEAP & EHEAP), Medicaid, Ohio Energy Credits Program (OECF), Ohio Works First (OWF), and Supplemental Security Income (SSI).
- **Credits:** 100% of line and service order charges; \$10.20 off monthly access charge.
- **Other Benefits:**
Waiver of deposit, free blocking of toll and 900/976 and special payment arrangements.
- **Restrictions:**
One access line per household and optional services prohibited.

□ **USA Plan 2**

- **Eligibility:**
Potential enrollee must receive aid from one of the following programs: Federal Public Housing, Food Stamps, Home Energy Assistance Programs (HEAP & EHEAP), Medicaid, Ohio Energy Credits Program (OECF), and Supplemental Security Income (SSI).
- **Credits:** 100% of line and service order charges; \$5.25 off monthly access charge.
- **Other Benefits:**
Waiver of deposit, free blocking of toll and 900/976 and special payment arrangements.
- **Restrictions:**
One access line per household (optional services are permitted.)

1999 OHIO USA MARKETING PLAN

STRATEGIES/OBJECTIVES

- Create awareness of USA plans with public service agencies and other organizations that reach targeted individuals, especially those without phone service.
- Make existing Ameritech customers aware that the USA program has improved to allow features on a USA account.
- Make it easier and simpler for customers to subscribe to USA programs.

TACTICS

Note: All Customer materials and correspondence to be reviewed by the Public Utilities Commission of Ohio prior to distribution.

□ ***Direct Mail***

- Inserts in state agency mailings: Information on USA plans inserted into Ohio Department of Development HEAP mailings and into Ohio Department of Human Services mailings (dates TBD).
- Ameritech bill page messages: An informational message printed on bills quarterly (months TBD).
 - Ameritech bill page messages on all non-USA residential customers:
2.4M
 - Ameritech bill page messages on all USA residential customers:
118M
- State agency letters: A letter sent to the 16 remaining Ohio Department of Human Services locations in the Ameritech region offering to install a direct telephone line, at Ameritech's expense, to be used by prospective USA recipients. Four locations have already had lines installed as of March 1999.

1999 OHIO USA MARKETING PLAN

□ **Customer Outreach**

• **Agency letter campaign:**

Letters to eligible government assistance agencies and other low-income assistance groups explaining benefits of USA program to their constituents and informing groups on how to order bulk applications. (Date TBD).

- Letter and brochure: 500

• **Outreach groups:**

Solicit proposals (RFP) from various agencies/groups for grants to perform customer outreach. Groups will be located in the six Ameritech areas (Akron/Canton, Cleveland, Columbus/SE Ohio, Dayton, Toledo, and Youngstown).

The purpose of outreach is to go above and beyond the normal day-to-day activities to inform and educate the community groups, public and private human service organizations, churches, hospitals and healthcare entities, and neighborhood organizations, about the Ameritech USA Program, both Plans 1 and 2.

- 6 contracts for 2 months. Each area will be allocated \$3,000 for the two month period. Another 6 contracts will be awarded later in 1999.

□ **Public Relations**

- **Radio Public Service Announcements (PSAs):** Produce :30 second radio spot about USA program and distribute to radio stations for PSA trafficking. Produced by Ameritech and sent through the Ohio Consumer Council to better encourage airplay.

- Production of :30 second radio spot

- **"Consumer Alert" media releases:** Quarterly releases to Ohio media trumpeting the virtues of the USA program. Releases will be written by Ameritech, but sent out under the cover of the Public Utilities Commission of Ohio.

□ **Sales Channel Education**

- **2-Way Communication:** E-mails to all Ohio Customer Care Center (CCC) sales associates reaffirming current methods and procedures for USA and informing them of any upcoming marketing initiatives. All USA calls received by CCC associates are transferred to AFFINA.
- **On-Line Reference Guide:** For easy reference, detailed information on USA will be included in the online sales tool available to all CCC associates through their desktop terminals.

□ ***Customer Education/Application Materials***

- **USA Cards**: Production and printing of USA cards in English, Spanish and Braille. USA Cards are used for statewide mailings.
 - Printing of 650K cards
 - Paper stock for 650K cards
 - Translation/typesetting for Spanish
 - Shipping to warehouse
 - Storage of USA Material
- **New USA Brochure Application**: Production and printing of brochure application for use by outreach agencies and at special events.
 - Printing & paper for 100K English & 20K Spanish brochures.
 - Translation for Spanish brochures
- **Fliers**: Distributed to social agencies in the Ameritech region and also available by request. Produced in both English (100K) and Spanish (1K).
- **Posters**: Also distributed to social service agencies to be displayed in agency offices and buildings.

□ ***Operational Improvements***

- **Auto Enrollment**: Pilot program being developed with ODHS to test effectiveness and efficiency of enrolling customers into USA via social security number matches.
- **On-Line Verification**: Using data from ODHS, enrolling customers on their initial call through access to ODHS database, thereby eliminating self-verification letter.
- **Secondary placement on CCC voice response unit**.
- **Revised VRU Verbiage**: Correct the qualifying programs in March 99. Add the seasonal aspect of HEAP and OECP in April 99.
- **Scripts**: Develop and implement scripts for AFFINA to ensure constant communication of customer information.

No Security Deposit
Free Installation
Free Touch-Tone
Free Call Blocking for 900 & 976
Numbers*
Free Blocking of Long Distance Service*
Payment Arrangements on Outstanding
Bills

*Services available at customer's request

To help you manage your monthly bill and
meet your calling needs, you can select
from one of the following plans

NOTE Both plans include all of the
features described above)

PLAN 1

This offers a monthly discount of \$10.20.
(\$122.40 per year)

With Plan 1, you will not be able to
subscribe to any calling features such as
Call Waiting. However, medical or
emergency exceptions may apply

PLAN 2

This offers a monthly discount of \$5.25.
(\$63 per year).

With Plan 2, the discount is smaller but you
can have optional services such as Call
Waiting. You will pay the normal charges
for these services.

Es important que Ud entienda la información
que ha sido suministrada por su compañía de
teléfono. Si no lee el idioma inglés, por favor
solicite ayuda a un amigo o a su organización
comunitaria local.

BUSINESS REPLY MAIL

FIRST-CLASS MAIL PERMIT NO. 221 CLAWSON, MI

POSTAGE WILL BE PAID BY ADDRESSEE

Ameritech Universal Service Assistance (USA) Program
P.O. Box 428
Clawson, MI 48017-9914



Universal Service Assistance

**Helps You Save Money
On Your Phone Bill**

Ameritech.

**In a world of technology,
people make the difference.**

Up to \$122 Per Year on Their Phone Bill

You could also save \$36.50 on new phone installations or transfer of service

For more information or to speak with a USA Representative
Call 1-800-335-USA1 (1-800-335-8721)
or fill out and mail the application below
(postage paid)

***You may be eligible if you receive aid through Food Stamps, HEAP, E-HEAP,
Federal Public Housing / Section 8, Medicaid, Ohio Energy Credit Program, Ohio Works First
(formerly AFDC), SSI or Disability Assistance.**

Application for Universal Service Assistance - Ohio

- ☐ Sign me up for Plan 1 (Optional Services Restricted)
☐ Sign me up for Plan 2 (Optional Services Allowed)

Eligibility for Universal Service Assistance (USA 1 & USA 2) is dependent on Applicant's participation in one or more of the following programs:

1. I hereby certify that I participate in the following programs (check all that apply):

<input type="checkbox"/> Home Energy Assistance Program (HEAP)	<input type="checkbox"/> Food Stamps
<input type="checkbox"/> Emergency Home Energy Assistance Program (E-HEAP)	<input type="checkbox"/> Medicaid
<input type="checkbox"/> Federal Public Housing or Section 8	<input type="checkbox"/> Supplemental Security Income (SSI)
<input type="checkbox"/> Ohio Works First (was AFDC & TANF)...USA 1 ONLY	<input type="checkbox"/> Ohio Energy Credit Program (OECF)
<input type="checkbox"/> Disability Assistance (State or County)...USA 1 ONLY	

(Attention: Social Security, PIP and Medicare DO NOT qualify)

2. I also hereby certify that:

☐ My telephone service is listed in my name
☐ I am not listed as a dependent on another person's tax return
☐ The address listed is my primary residence; not a second home or business; and

3. If, in the future, I no longer participate in at least one of the programs listed in item 1 above or conditions in item 2 above change, I will promptly notify Ameritech - Ohio that I am no longer eligible for the Universal Service Assistance Program.
4. I authorize Ameritech - Ohio or its duly appointed representative to access any records required to verify these statements confirm my continued participation in the above program. I authorize representatives of the above programs to discuss and/or provide copies to Ameritech - Ohio, if requested by the company, to verify my participation in the above programs my eligibility for Universal Service Assistance.
5. I affirm, under penalty of perjury, that the foregoing representations are true.

Applicant's Name: _____

County: _____

Address Street: _____

State: _____

City: _____

Zip Code: _____

Telephone Number: _____ Or Can Be Reached at: _____

Social Security Number: _____

Signed: _____

Date: _____

Save Money on Your Phone Bill

*Save up to \$10.20 per month
with the USA Program from Ameritech*

If Ameritech Provides Local Phone Service In Your Area
And You Receive Aid From One Of The Following Programs:

- Home Energy Assistance Program (HEAP)
- Emergency HEAP (E-HEAP)
- Ohio Energy Credit Program (OECF)
- Medicaid
- Supplemental Security Income (SSI)
- Federal Public Housing / Section 8
- Food Stamps
- Ohio Works First (Formerly AFDC)
- Disability Assistance



You may be eligible for savings from the Universal Service Assistance (USA) program.



In a world of technology,
people make the difference.



RECEIVED-DOCKETING DIV

99 JUN 30 PM 1:30

PUCO

June 30, 1999

Ms. Daisy Crockron
Docketing Division
The Public Utilities Commission of Ohio
180 E. Broad St.
Columbus, OH 43215

Re: Case No. 93-487-TP-ALT

Dear Ms. Crockron:

As required by the Commission's Opinion and Order issued December 30, 1998, attached for filing is the final report of Ameritech's activities toward compliance with the decision. This report modifies the report filed June 17, 1999, based upon input from the Commission Staff.

A copy of the report was provided to the USA Advisory Committee and the parties in the complaint proceeding.

Sincerely,

A handwritten signature in cursive script, appearing to read "Judith E. Matz".

Regulatory Affairs



Case No. 93-487-TP-ALT
Ameritech USA Status Report
June 30, 1999

Please be advised that Ameritech has fulfilled all aspects of the Commission's December 30, 1998 order in Case Number 93-487-TP-ALT, as modified by the Commission's February 17, 1999 Entry on Rehearing, regarding USA compliance. The action plan set forth nine requirements, as identified below.

During the six-month course of the action plan, Ameritech has experienced a gain of nearly 11,000 additional USA participants. This represents a 20% gain in participation and exceeds the gain experienced for the entire 1998 calendar year.

Requirement 1: Ameritech shall designate one person to have responsibility for the USA program. That person should have ample decision-making authority for the various issues related to this program, be capable of overseeing the program (including changes), and be committed to carrying out the responsibilities of the program....

Completed Status: In order to comply with this requirement, Ameritech has designated Susan Murtha. Susan is a Senior Manager with Ameritech Consumer Services.

Requirement 2: Improvements should be made with regard to publicity... Personnel capable of developing appropriate materials must be available for this program and an "action plan" under which future publicity efforts will be undertaken should be developed. The action plan should be provided to the Advisory Committee so that it may consider Ameritech's intentions for its publicity efforts.

Completed Status: A Communications and Marketing Plan was developed and reviewed with Commission staff and the USA Advisory Committee during the first quarter.

Mass mailings in cooperation with the Ohio Department of Development (HEAP) have occurred in January, February, March, April and May.

The Spanish version of the USA flier has been produced and distributed. Additionally, in cooperation with Parkview Arcawide Seniors, Hungarian and Romanian versions were reproduced.

First and second quarter Bill Page Messages were included with customers' bills.

Outreach is currently being performed by seven groups during the months of May and June.

Requirement 3 (Entry on Rehearing dated February 17, 1999): It was concluded that modifying the composition of the dedicated work group will not be required... Ameritech shall devise a comprehensive action plan within 30 days of the Entry on Rehearing pursuant to which it will make appropriate changes to ensure proper handling by the various personnel involved with USA calls... This action plan shall be filed with the Commission and provided to the Advisory Committee (so that Ameritech and the Advisory Committee can consider the plan and work together to fine tune it). Once finalized, Ameritech shall implement the plan forthwith.

Completed Status: The Call Handling Report was filed with the Commission on March 19, 1999 and a copy provided to the Commission staff and the USA Advisory Committee on March 19, 1999. The Call Handling Report was reviewed and accepted by Commission staff and the USA Advisory Committee without changes or modifications and is therefore considered to be the final version of the Call Handling Report.

Requirement 4: Ameritech shall negotiate the necessary terms and obligations to implement with various service agencies an on-line verification process. Additionally, Ameritech should negotiate the necessary terms and obligations to implement an automatic enrollment pilot with various service agencies (for a discrete area in Ohio). Commission staff should be involved in those discussions as well.

Completed Status Auto Enrollment: Eligible customers in the 614 area code were auto-enrolled in USA Plan during the first week of June 1999. A total of 2,411 customers were auto-enrolled.

Completed Status On-line Verification: Effective 5/28/99 the on-line verification process was implemented by the vendor. Approximately 500,000 eligible social security numbers were loaded into the vendor database. These social security numbers are used to match verify USA eligibility on incoming calls and to enroll in USA. The on-line verification process eliminates the need for the customer to mail in the proof of perjury letter.

Commission staff was involved in weekly team meetings and discussions and conducted a field visit with Ameritech personnel, on May 28 1999, to the USA vendor site to observe, first hand, training and implementation of the on-line verification process.

Requirement 5: Written applications (particularly with an automatic enrollment pilot) should be accepted by Ameritech... Ameritech shall work with the Advisory Committee to develop an appropriate written application form

Completed Status: Ameritech worked with the USA Advisory Committee and Commission staff in the development of the written application. Shipment of the completed form to the various agencies occurred in May 1999.

Requirement 6: Ameritech is instructed to recognize the need to adjust staffing and fulfill that staffing need with scheduled USA publicity efforts.

Completed Status: Ameritech continues to monitor and evaluate staffing levels. No staffing issues have been encountered.

Requirement 7: Ameritech should conduct a formal study to evaluate the reasons for USA "drop offs". The Advisory Committee and Commission staff should review this study prior to it being conducted.

Completed Status: Ameritech contracted with an outside consultant, Dr. Charles Jamison, to conduct qualitative Focus Groups with past and present USA participants. The USA Advisory Committee and Commission staff reviewed and endorsed the proposed research design. Focus groups were held in Cleveland and Columbus in May 1999. Dr. Jamison has prepared a program analysis and is presenting findings to Commission staff and the Advisory Committee on June 21, 1999.

With regard to the quantitative portion of the study, statistics have been gathered and customer profiles developed. Ameritech presented the report to Commission staff and the Advisory Committee.

Requirement 8: Ameritech should fulfill its commitment to install direct telephones in all ODHS offices in its service territory for which a technical feasibility issue is not present.

Completed Status: Directors of thirty-two ODHS offices in the thirty Ameritech Ohio counties have been sent letters asking for their permission to install a telephone in their county locations. To date, fifteen county offices have responded positively. Seventeen lobby phones have been installed and three lobby phones are pending installation. Six county offices have declined the offer citing reasons of small offices and already heavy traffic. Nine county offices did not respond to the letter. Ameritech followed up with a phone message to non-respondents.

Requirement 9 (Entry on Rehearing issued February 17, 1999): Ameritech is instructed to appropriately modify the Voice Response Unit (VRU) information and make the information available under another sub-menu, besides "new services".

Completed Status: The list of eligibility programs was re-recorded and was in production with the March VRU release. The revised script regarding the seasonal aspect of HEAP and OECP was approved by the Commission staff, recorded, and was put in place with the April VRU release.

The Commission staff approved a secondary placement of USA on the VRU. The USA announcement continues to be heard by customers requesting new service and additionally by existing Ameritech customers whose call will be handled by a Customer Care Center associate. The new placement and script was put in place with the April, 1999 VRU release.

SERVICE LIST

CASE NO. 93-487-TP-ALT

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